

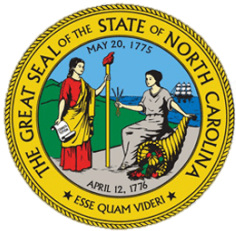
North Carolina COVID-19 Vaccine Management System (CVMS) Provider Portal

Step 9 - Invite recipients to self-schedule their appointments (optional)

User Guide

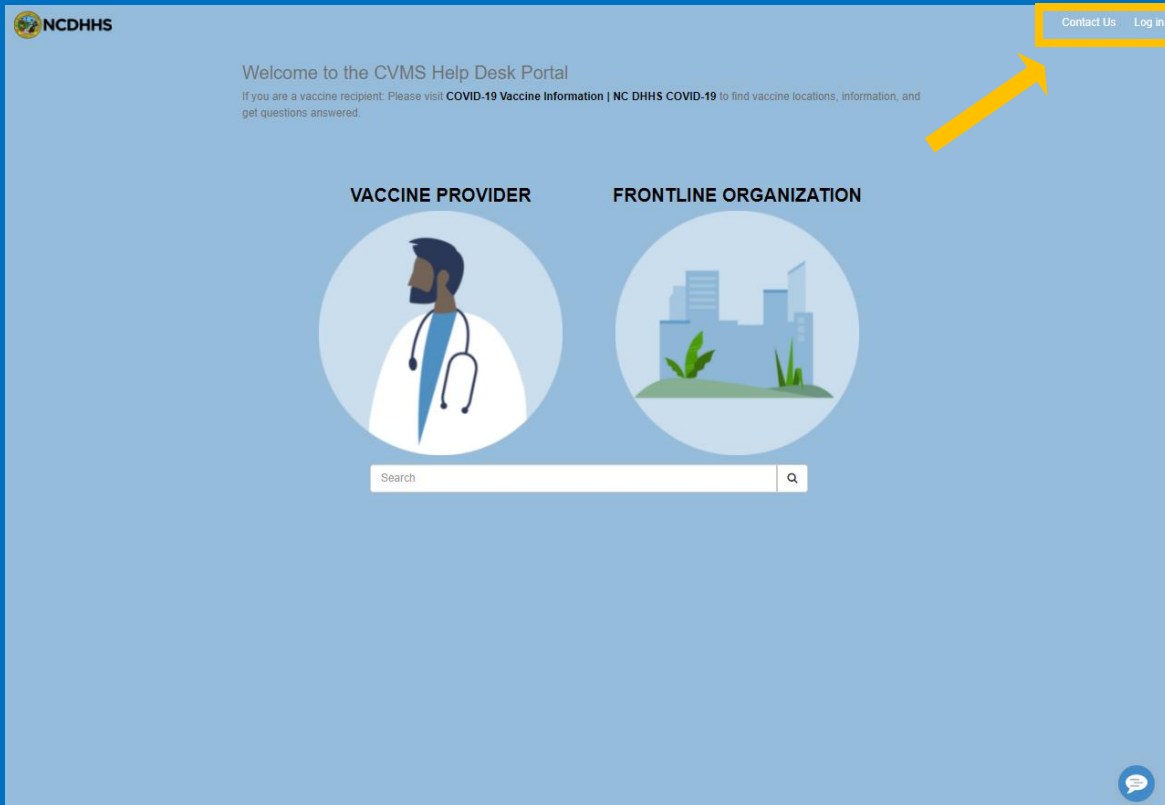
Version 10

August 26, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Desk at **(877) 873-6247** and select option 1. The COVID-19 Vaccine Provider Help Desk is available during the following hours:
Monday to Friday: 7 am – 7 pm ET
Saturday & Sunday: 8 am – 4 pm ET

* On the home page of the CVMS Help Desk Portal, select Login at the top right-hand corner, then select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, and business e-mail
3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Overview	4 – 7
Initial Setup of the Scheduling Feature in CVMS	8 – 19
Enable the Scheduling Feature	9 – 14
Activate Scheduling for Your Location	15 – 19
Publish Appointment slots using the Scheduling Feature in CVMS	20 – 49
Set Maximum Number of Appointments	21 – 27
Set Weekly Location Schedule for Dose 1 and Dose 2 appointments	28 – 36
Create Non-Regular Availability	37 – 41
Review Number of Appointments Booked and Remaining Quantity	42 – 45
Review Availability Report	46 – 49
Scheduling from the Perspective of a Recipient	50 – 51
Appendix	52 – 55
Next Steps	53 – 53

Overview

Overview

Vaccines.gov Home Find Vaccines Español CDC

Need help finding a vaccine in the U.S.? Call 1-800-232-0233 (TTY 888-720-7489)

← Back to Search

We found 50 Providers

Powered by **VaccineFinder**

Showing results for **Moderna (age 18+), Pfizer-BioNTech (age 12+) and Johnson & Johnson/Janssen (age 18+)** near **27577** within **25 miles**

Vaccine availability is subject to change. Appointments are required at most locations. Click a location with vaccine "In stock" to take the next step.

1. [Horizon Family Medicine Smithfield](#)

Select a date & time

2110 Blue Ridge Rd, Raleigh, North Carolina 27607 [Change](#)

Appointment 1
Choose a date and time

March 2021

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

7 appointments available
For Thursday March 11, 2021

1:00pm	2:00pm	3:00pm
4:00pm	5:00pm	6:00pm
7:00pm		

[Continue](#)

[Back](#)

The scheduling feature in CVMS is optional. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment for a COVID-19 vaccine and register in CVMS altogether. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected group of recipients (e.g., long-term care facility, prison).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> with your NCID username and password

Now, let's get started!

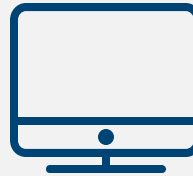
Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on the CDC's Vaccines.gov website.



1

Enable scheduling for your account in the CVMS Provider Portal.



2

Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose appointments.



3

Set your weekly availability to receive appointments.

Update the number of first-dose appointments you can receive regularly.

CVMS Scheduling Key Terms

Appointments Per Time Window

The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.

Start Date

First day the location will show available appointment slots.

Closing Date

Last day the location will show available appointment slots on the Vaccine Site Locator website.

Vaccine Supply

The Vaccine (Appointment) Supply record is the number of appointments that are made available.

Current Stock

The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.

Date of Stock Count

Date of creation of the Vaccine Supply Record. Once created, **do not edit this date.**

Dose Number

Create two vaccine supply records for 1st and 2nd dose. Use this field to identify if this vaccine supply includes 1st dose or 2nd dose vaccine.


Initial Setup of the Scheduling Feature in CVMS

Enable the Scheduling Feature

Step 1 of 5: Navigate to the Locations Tab

Providers can opt-in to using the scheduling feature in CVMS.

- 1. Click on the **LOCATIONS** tab



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
Mar 10, 21, 09:47 AM	Wednesday Morning Dose 1 Scheduled	03045809	Clinic Location1
Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

View all

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Location
Manager

Step 2 of 5: Begin to Enable Scheduling

1. Click the **ENABLE SCHEDULING** button



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date
Clinic 1	Clinic Org1	123 Test Dr, Vik, Iceland, North Carolina 27609 919-919-1919		
DoNotUse-FakeLocation	Clinic Org1	163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514		
TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021

Audience

Healthcare
Location
Manager

Step 3 of 5: Select Provider Account

The scheduling feature in CVMS can be enabled for each provider account. Once your account has been enabled, all locations associated with that provider can begin using the scheduling feature in CVMS.

1. Select the provider(s) for which you want to enable the scheduling feature in CVMS
2. Click **NEXT**

Audience

Healthcare Location Manager

NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More ▾

Select Accounts

Please select the PE Location that you would like to enable for CVMS Scheduling. If you do not see your PE Location from this list, then it has already been enabled with self-attestation completed.

<input type="checkbox"/>	Name ▾	Address 1 ▾	Address 2 ▾	City ▾	State ▾	Zip Code ▾	Provider PIN ▾
<input checked="" type="checkbox"/>	Sunny Skies Clinic	1355 Springlawn ...		Raleigh	North Carolina	27609	417052

Cancel

Next

DoNotUse-FakeLocation

Clinic Org1

163 E Franklin St, Chapel Hill,
NC 27514, Chapel Hill, North
Carolina 27514

▼

TEST Clinic Location1 - Com-
munity Vaccination Event

Clinic Org1

123 red robin, red, North Car-
olina 27613 555-555-5555

03/22/2021

04/06/2021

▼

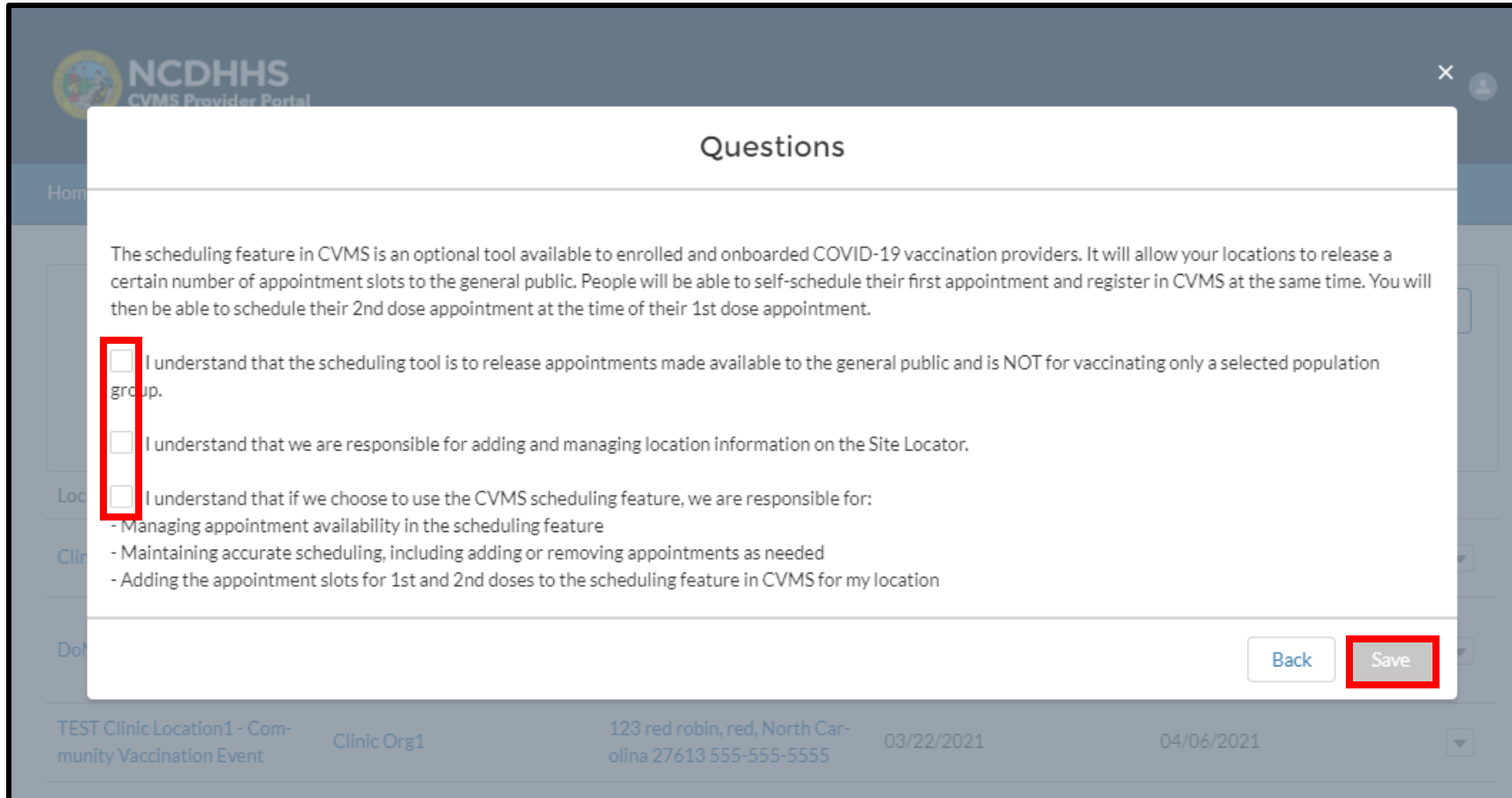
Step 4 of 5: Review Questions

Read and review the statements. You must agree to all statements before you can enable the scheduling feature in CVMS for your location.

1. Check the checkbox attesting that you understand each statement
2. Click **SAVE**

Audience

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The screenshot shows a web application interface for the NCDHHS CVMS Provider Portal. A modal dialog titled "Questions" is displayed in the center. The dialog contains a paragraph of text explaining the scheduling feature, followed by three checkboxes, each with a statement of understanding. The first checkbox is highlighted with a red box. Below the checkboxes are "Back" and "Save" buttons, with the "Save" button also highlighted with a red box. The background of the portal shows a table with location information.

Questions

The scheduling feature in CVMS is an optional tool available to enrolled and onboarded COVID-19 vaccination providers. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment and register in CVMS at the same time. You will then be able to schedule their 2nd dose appointment at the time of their 1st dose appointment.

☐ I understand that the scheduling tool is to release appointments made available to the general public and is NOT for vaccinating only a selected population group.

☐ I understand that we are responsible for adding and managing location information on the Site Locator.

☐ I understand that if we choose to use the CVMS scheduling feature, we are responsible for:

- Managing appointment availability in the scheduling feature
- Maintaining accurate scheduling, including adding or removing appointments as needed
- Adding the appointment slots for 1st and 2nd doses to the scheduling feature in CVMS for my location

[Back](#) [Save](#)


TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021
---	-------------	---	------------	------------

Step 5 of 5: Navigate to the Locations Tab

Congratulations! Your selected location is now enabled to use the scheduling feature in CVMS!

Audience

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Manager



Success!

Scheduling enabled for selected accounts

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date


Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Clinic 1	Clinic Org1	123 Test Dr, Vik, Iceland, North Carolina 27609 919-919-1919			
DoNotUse-FakeLocation	Clinic Org1	163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514			
TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021	

Activate Scheduling for Your Location

Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
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Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

View all

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Location
Manager

Step 2 of 4: Select the Location

1. Click on the **LOCATION NAME** for which you wish to enable the scheduling feature in CVMS



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More ▾

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name ▾	Account ▾	Address ▾	Start Date	Closing Date	
Clinic Location1	Clinic Org1	1204 SCHOOL ST, WILKES-BORO, North Carolina 28697	04/07/2021		▾
Sunny Skies Clinic	Sunny Skies Clinic	1355 Springlawn Ct, Raleigh, North Carolina 27609 919-919-0000	04/13/2021		▾
123 Test Dr. Raleigh, North					

Audience

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Location
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Tips

You can choose to enable the scheduling feature in CVMS for some or all your locations.

Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

- 1. Click **EDIT**



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Sunny Skies Clinic

Edit

Details

Related

Availability

Location Name

Sunny Skies Clinic

Event Type

Short Term Community Event

Scheduling Information

Display on Vaccine Site Locator

Yes

Appointment Phone

555-555-5555

Account

Training Team Vaccine Provider - Site 2

Appointment Scheduling Website

Provider Website

Audience

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Location
Manager

Tips

Locations will be displayed on the Vaccine Site Locator website <https://vaccines.gov> if the Display on Vaccine Site Locator field is set to **YES** and if the Location Setting field is set to **DEFAULT**.

Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

1. Check the **CVMS SCHEDULING** box
2. Click **Save**

Edit Sunny Skies Clinic

Wednesday Start Time	Wednesday End Time
--None--	--None--
Thursday Start Time	Thursday End Time
--None--	--None--
Friday Start Time	Friday End Time
--None--	--None--
Saturday Start Time	Saturday End Time
--None--	--None--
Sunday Start Time	Sunday End Time
--None--	--None--

Fields Required for locations using the Scheduling feature

☒ CVMS Scheduling

Start Date ⁱ
5/31/2021

Closing Date ⁱ
6/4/2021

Created By
Kevin Kauffman, 5/24/2021, 12:01 PM

Last Modified By
Sanjay Sharma, 6/28/2021, 10:44 AM

Cancel Save & New **Save**

Audience

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Location
Manager

Tips

Both **CVMS Scheduling** and **Display on Vaccine Site Locator** should be checked to allow recipients to find your site and book appointments.

Publish Appointment slots using the Scheduling Feature in CVMS

Set Maximum Number of Appointments

Setting Vaccine Supply



“Vaccine (Appointment) Supply” is what sets the total number of first dose appointments available

- Set 1st dose Vaccine Supply to equal the number of 1st dose appointments you want to make available for that location
- It does NOT need to be the same as your total inventory on hand.
 - If you need to hold back doses (e.g., set aside for a planned event, Historically Marginalized Population outreach), do not include those in the “Vaccine Supply”
- You should only release the number of First-Dose appointments you are able to cover with your doses


Step 1 of 5: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

Audience

Healthcare
Location
Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

← Previous

Page 4 out of 4

Next →

Step 2 of 5: Edit your 1st Dose Vaccine Supply Record

- 1. Click on **RELATED**
- 2. Click on the down arrow for the **DOSE NUMBER 1 VACCINE SUPPLY RECORD**
- 3. Click **EDIT**

Audience

Healthcare
Location
Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location

Clinic Location1 - Community Vaccination Event

Edit

Details

Related

Availability

Vaccine Supplies (2)

New

Name	Current Stock	Vaccine Brand	Dose Number
SUP-00055	1,000	Generic	1
SUP-00056	1,000,000	Generic	2

View All

Step 3 of 5: Add new appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 1st dose appointments to be offered

Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.

For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

Audience

Healthcare
Location
Manager

Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

The screenshot displays the NCDHHS CVMS Provider Portal interface. The main navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and More. The left sidebar shows the 'Vaccine Supply' section with details for SUP-00055, including its name, vaccine (VAX-0002), current stock (1,000), and date of stock count (3/22/2021). The central panel shows the 'Edit SUP-00055' form. The 'Current Stock' field is highlighted with a red box and contains the value '1,000'. The 'Save' button at the bottom right is also highlighted with a red box.

Step 4 of 5: Edit your 1st Dose Vaccine Supply Record

- 1. Click on **RELATED**
- 2. Click on the down arrow for the **DOSE NUMBER 2 VACCINE SUPPLY RECORD**
- 3. Click **EDIT**

Audience

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Location
Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location

Clinic Location1 - Community Vaccination Event

Edit

Details

Related

Availability

Vaccine Supplies (2)

New

Name	Current Stock	Vaccine Brand	Dose Number
SUP-00055	1,000	Generic	1
SUP-00056	1,000,000	Generic	2

View All

Step 5 of 5: Add new appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 2nd dose appointments to be offered\

Note: When recipients have received for their first-dose appointment, you will be able to schedule their second-dose appointment (if applicable). Therefore, make the Current Stock large so you do not need to maintain the number of second-dose appointments to be released in the system.

2. Click **SAVE**

Audience

Healthcare
Location
Manager

Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.

The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

The screenshot displays the NCDHHS CVMS Provider Portal interface. The main content area shows the 'Edit SUP-00055' form. The form includes fields for Name (SUP-00055), Location (Clinic Location1 - Community Vaccination Event), Vaccine (VAX-0002), Current Stock (1,000), Date of Stock Count (3/22/2021), Vaccine Brand (Generic), and Dose Number (1). The 'Current Stock' field is highlighted with a red box. Below the form, the 'System Information' section shows the user 'Simon Couderc' and the date '3/10/2021, 11:43 PM'. At the bottom right of the form, the 'Save' button is highlighted with a red box.

Set Weekly Location Schedule for Dose 1 and Dose 2 appointments


Step 1 of 8: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

Audience

Healthcare
Location
Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

← Previous

Page 4 out of 4

Next →

Step 2 of 8: Set the Dates for which Recipients can Book an Appointment

First dose appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Click on the **DETAILS** tab
2. Click Edit
3. Enter the location **START DATE**
4. Enter the location **CLOSING DATE**
5. Click **SAVE**

The screenshot displays the 'Edit Sunny Skies Clinic' modal in the NCDHHS CVMS Provider interface. The modal is titled 'Edit Sunny Skies Clinic' and features a 'CVMS Scheduling' section with a checked checkbox. Below this, the 'Start Date' is set to 5/31/2021 and the 'Closing Date' is set to 6/4/2021, both highlighted with red boxes. At the bottom right of the modal, the 'Save' button is also highlighted with a red box. The background shows the 'Details' tab selected and an 'Edit' button highlighted with a red box.

Audience

Healthcare
Location
Manager

Tips


You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Second dose appointments will be available for booking after the minimum period between 2 doses (if applicable). See the Addendum for CVMS Scheduling Feature User Guide for additional instructions at <https://covid19.ncdhhs.gov/addendum-scheduling-feature-point-care-and-vaccine-administration-user-guide/download>.

Step 3 of 8: Open the Availability tab

The default vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

- 1. Click on the **AVAILABILITY TAB**



[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window
<input type="checkbox"/> MON	Unavailable		
<input type="checkbox"/> TUE	Unavailable		

Audience

Healthcare
Location
Manager

Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

Step 4 of 8: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for first dose appointments and second dose appointments.

- 1. Check the checkbox for each day you will administer vaccinations at this location (Monday through Sunday)

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours			Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	12:00 AM	12:00 PM	<input type="checkbox"/> All day	0	0	Actions
<input checked="" type="checkbox"/> TUE	12:00 AM	12:00 AM	<input type="checkbox"/> All day	0	0	Actions

Audience

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Manager

Tips

Unselected days will not be open to appointments.

Step 5 of 8: Set Opening Hours

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the **ACTIONS** on the right and select **ADD TIME**.

- 1. Enter the **OPENING HOURS**

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location Kevin's Pharmacy

Edit

Details Related **Availability**

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div><div>08:00 AM</div><div>12:00 PM</div></div> <div><div>12:00 PM</div><div>02:00 PM</div></div>	<div></div> <div></div>	<div></div> <div></div>	<div>Actions</div> <div>Actions</div> <div>Add time</div> <div>Remove</div>
<input type="checkbox"/> TUE	Unavailable			

Audience

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Location
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Tips

Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g., a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

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33

Step 6 of 8: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 5 to 15 minutes). Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location. If the **OPENING HOURS** require a unique **TIME WINDOW DURATION**, you must add another opening hours.

- 1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location

Audience

Healthcare
Location
Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div>08:00 AM</div> <div>12:00 PM</div> <div>12:00 PM</div> <div>02:00 PM</div>	<div>15</div> <div>15</div>	<div></div> <div></div>	<div>Actions</div> <div>Actions</div>
<input type="checkbox"/> TUE	Unavailable			
<input type="checkbox"/> WED	Unavailable			

Step 7 of 8: Enter Appointments Per Time Window

Appointments per time window is the number of people you can vaccinate at the same time. If the **OPENING HOURS** require a unique **APPOINTMENTS PER TIME WINDOW**, you must add another opening hours.

- 1. Enter the **APPOINTMENTS PER TIME WINDOW**

Audience

Healthcare
Location
Manager

HomeRecipientsAppointmentsLocationsBulk RegistrationVaccine InventoryMore

LocationKevin's Pharmacy

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DetailsRelatedAvailability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div>08:00 AM</div> <div>12:00 PM</div> <div>All day</div>	<div>15</div> <div>15</div>	<div>6</div> <div>3</div>	<div>Actions</div> <div>Actions</div>
<input type="checkbox"/> TUE	Unavailable			
<input type="checkbox"/> WED	Unavailable			

Step 8 of 8: Finalize Schedule

You have now created a default schedule for your location.

- 1. **REVIEW** the schedule for the location
- 2. Click **SAVE**

Congratulations! You have now finalized the default schedule for your location!

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	08:00 AM ▾ 12:00 PM ▾	<input type="text" value="15"/> <input type="text" value="15"/>	<input type="text" value="6"/> <input type="text" value="3"/>	Actions ▾ Actions ▾
<input type="checkbox"/> TUE	Unavailable			
<input type="checkbox"/> WED	Unavailable			
<input type="checkbox"/> THU	Unavailable			
<input type="checkbox"/> FRI	Unavailable			
<input type="checkbox"/> SAT	Unavailable			
<input type="checkbox"/> SUN	Unavailable			

Cancel Save

Audience

Healthcare
Location
Manager

Tips

The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

Create Non-Regular Availability


Step 1 of 4: Navigate to the Location

Set a non-regular availability schedule to create a schedule when your location does not follow the default schedule availability in the case of holiday closure, reduced hours, large vaccination event, or more.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

Audience

Healthcare
Location
Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

Previous

Page 4 out of 4

Next

Step 2 of 4: Open the Availability tab

Non-regular availability is set on the Availability tab. The default schedule is at the top. If the location does not follow this schedule, create an **AVAILABILITY OVERRIDE**.

- 1. Click on the **AVAILABILITY TAB**
- 2. Scroll-down to the bottom of the page, and click the **NEW AVAILABILITY OVERRIDE** button

☐ THU

Unavailable

☐ FRI

Unavailable

☐ SAT

Unavailable

☐ SUN

Unavailable

Cancel

Save

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

New availability override

Audience

Healthcare
Location
Manager

Tips

A location can have up to 10 **AVAILABILITY OVERRIDES**.

Step 3 of 4: Set Override Dates

The Availability Override schedule will override the default schedule availability between the dates that you set.

- 1. Set the beginning of the Availability Override in the **FROM** field
- 2. Set the end of the Availability Override in the **UP TO AND INCLUDING** field

Audience

Healthcare
Location
Manager

Tips

For a single day closure, select the same date in the two date fields FROM and UP TO AND INCLUDING.

If the override does not currently have an end date, select the No end date, run ongoing checkbox

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions ▾

Select the date range you want to override

From

📅

2021-05-31

▾

Up to and including

📅


2021-05-31

▾

☐ No end date, run ongoing

Weekly pattern

Day	Opening hours	Time window duration (mins)	Appointments per time window
<input type="checkbox"/> MON	Unavailable		
<input type="checkbox"/> TUE	Unavailable		
<input type="checkbox"/> WED	Unavailable		



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40

Step 4 of 4: Set Availability Schedule for Override Dates

Create the override availability schedule for the location. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on creating an availability schedule. Note, this schedule will only apply to the location between the availability override dates.

- 1. Set your override availability schedule
- 2. Click **SAVE**

Audience

Healthcare
Location
Manager

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions

Select the date range you want to override

From

Up to and including

2021-05-31

2021-05-31

☐ No end date, run ongoing

Weekly pattern

Day	Opening hours	Time window duration (mins)	Appointments per time window
<input type="checkbox"/> MON	Unavailable		
<input type="checkbox"/> TUE	Unavailable		
<input type="checkbox"/> WED	Unavailable		

Review Number of Appointments Booked and Remaining Quantity

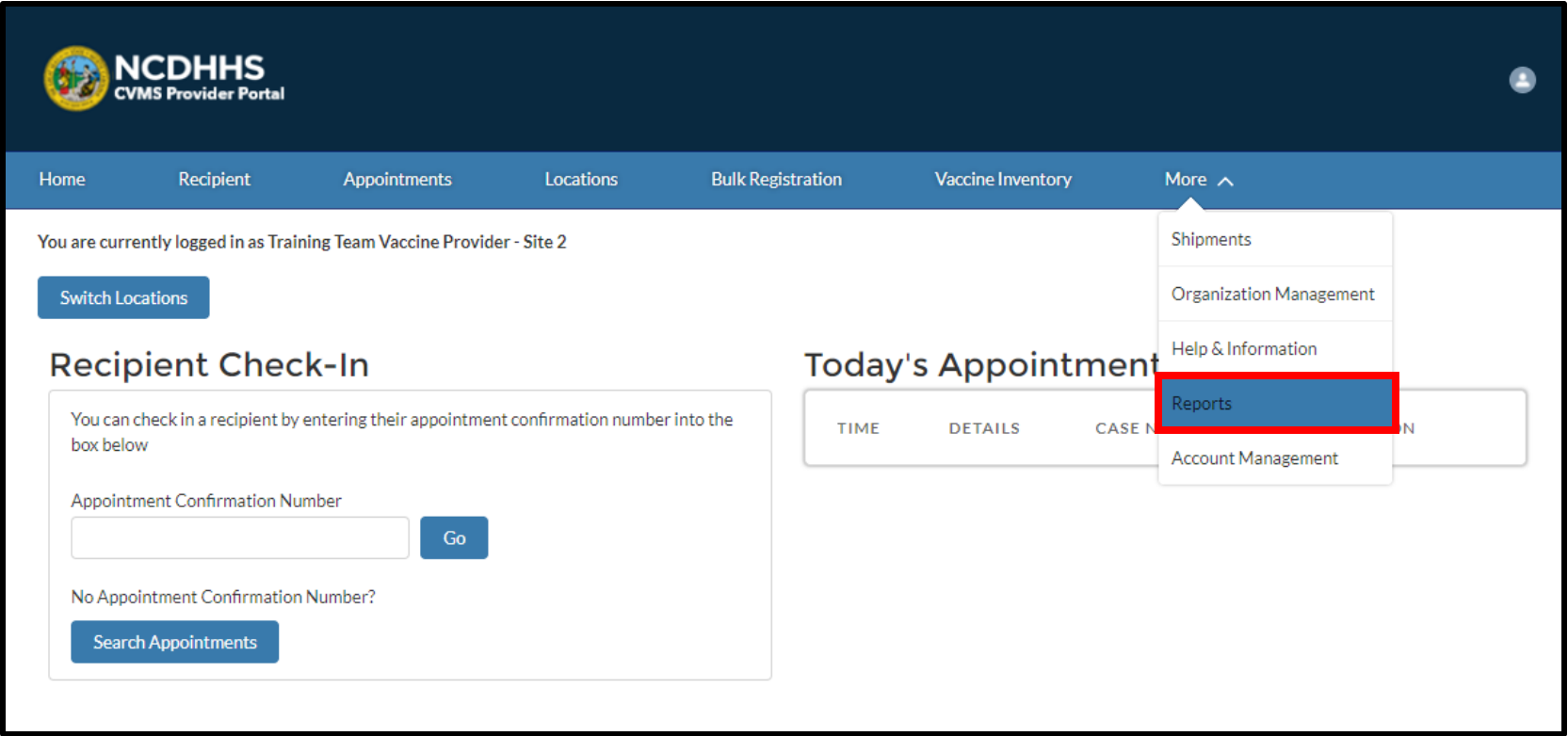
Step 1 of 3: Navigate to Reports

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose appointments released in the system. A report is provided to you to aid you in releasing additional appointments.

- 1. Click on the **REPORTS** tab

Audience

Healthcare
Location
Manager



Step 2 of 3: Open Vaccine Supply Report

The **DOSE 1 VACCINE SUPPLY REPORT** and **DOSE 2 VACCINE SUPPLY REPORT** are found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **DOSE 1 VACCINE SUPPLY REPORT** or **DOSE 2 VACCINE SUPPLY REPORT**

Audience

Healthcare
Location
Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.

The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and a More dropdown. Below the navigation bar, a message states: "For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles." The main content area is titled "Reports" and "All Reports" with a search bar and a settings icon. A table lists the reports, with "Dose 1 Vaccine Supply Report" and "Dose 2 Vaccine Supply Report" highlighted by red boxes. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Created by Me	Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Private Reports	Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
FOLDERS	HCLM EHR Error Report		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM	
All Folders						
Created by Me		This report identifies all users and associated				


Step 3 of 3: Review Vaccine Supply Report

The **VACCINE SUPPLY REPORTS** show you the Current Stock as the location, the number of appointments (jobs) for the relevant dose, and the number of additional appointments that can be booked (remaining quantity). If the **REMAINING QUANTITY** is larger than 0, recipients will be able to book an appointment at this location if there is an available appointment slot. If this number is 0 or less, you must increase the current the Current Stock so that the Remaining Quantity is larger than 0 before additional recipients can book appointments.

- 1. Review the **REMAINING QUANTITY** and determine how many additional appointments to release
- 2. Click on the location name hyperlink

Audience

Healthcare
Location
Manager



Home

Recipient


Appointments

Locations

Bulk Registration

Vaccine Inventory

More



Report: Jobs with Location
Dose 1 Vaccine Supply Report
Vaccine supply Current Stock for Dose 1

Search

Add Chart

Filter

Refresh

Export

Total Location: Current Stock value...

Cumulative nb of jobs for dose 1

Remaining quantity (Dose 1 only)

3

2

1

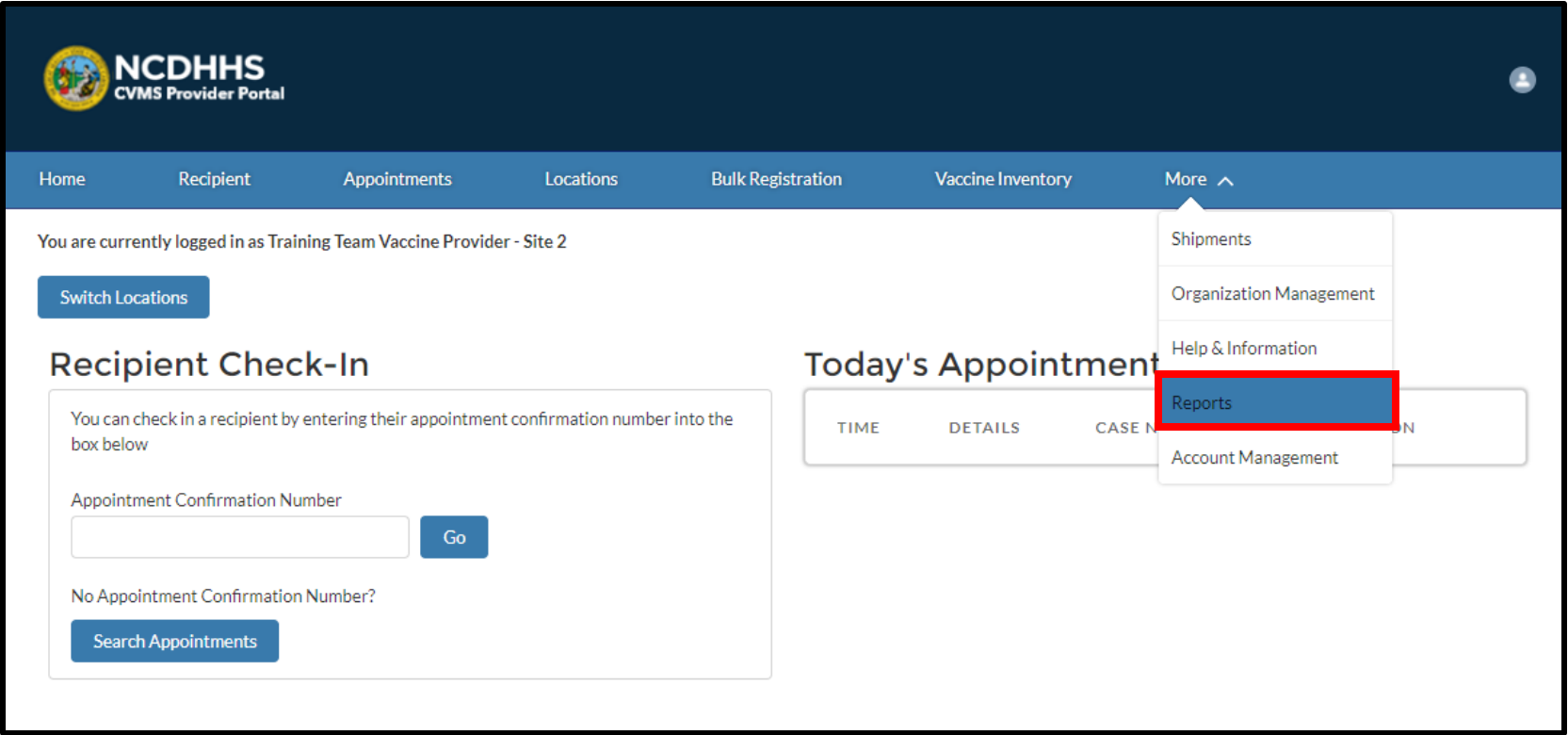
<input type="checkbox"/> Location: Location Name ↑	Sum of Location: Current Stock value (Dose 1 only)	Σ Cumulative nb of jobs for dose 1	Σ Remaining quantity (Dose 1 only)
<input type="checkbox"/> Kevin's Pharmacy	3	2	1
Total	3	2	1

Review Availability Report

Step 1 of 3: Navigate to Reports

If you wish to review your location’s schedule availability for the next 7 days, the **AVAILABILITY REPORT** will show you the number of appointment slots, booked appointments, and remaining appointments.

- 1. Click on the **REPORTS** tab



Audience

Healthcare
Location
Manager


Step 2 of 3: Open Availability Report

The **AVAILABILITY REPORT** is found in the All-Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

- 1. Click on the **ALL REPORTS** folder
- 2. Click on the **AVAILABILITY REPORT**

Audience

Healthcare
Location
Manager



Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

Reports

All Reports

7 items

REPORTS

Recent

Created by Me

Private Reports

All Reports

FOLDERS

All Folders

Created by Me

Report Name	Description	Folder	Created By	Created On	Subscribed
Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
HCLM EHR Error Report		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM	
	This report identifies all users and associated				

Step 3 of 3: Review Schedule Availability for the Next 7 Days

The screenshot displays the NCDHHS CVMS Provider Portal interface. At the top, the NCDHHS logo and 'CVMS Provider Portal' text are visible. Below the navigation bar, the 'Availability Report' is shown for 'Training Team Vaccine Provider - Site 1'. The report includes summary statistics and a detailed table of appointment slots.

Report: Day Reports with Location
Availability Report
Availability Report per Skedulo location

Number of Appointment slots per ... 240
Number of slots booked for a Dos... 0
Number of slots booked for a Dos... 0
Remaining Quantity of slots 240

Location: Location Name ↑	Date ↑	fx Number of Appointment slots per day	fx Number of slots booked for a Dose 1	fx Number of slots booked for a Dose 2	fx Remaining Quantity of slots
Training Team Vaccine Provider - Site 1	5/17/2021	96	0	0	96
	5/18/2021	144	0	0	144
Total		240	0	0	240

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Healthcare
Location
Manager

Tips

The Availability Report is updated once daily.

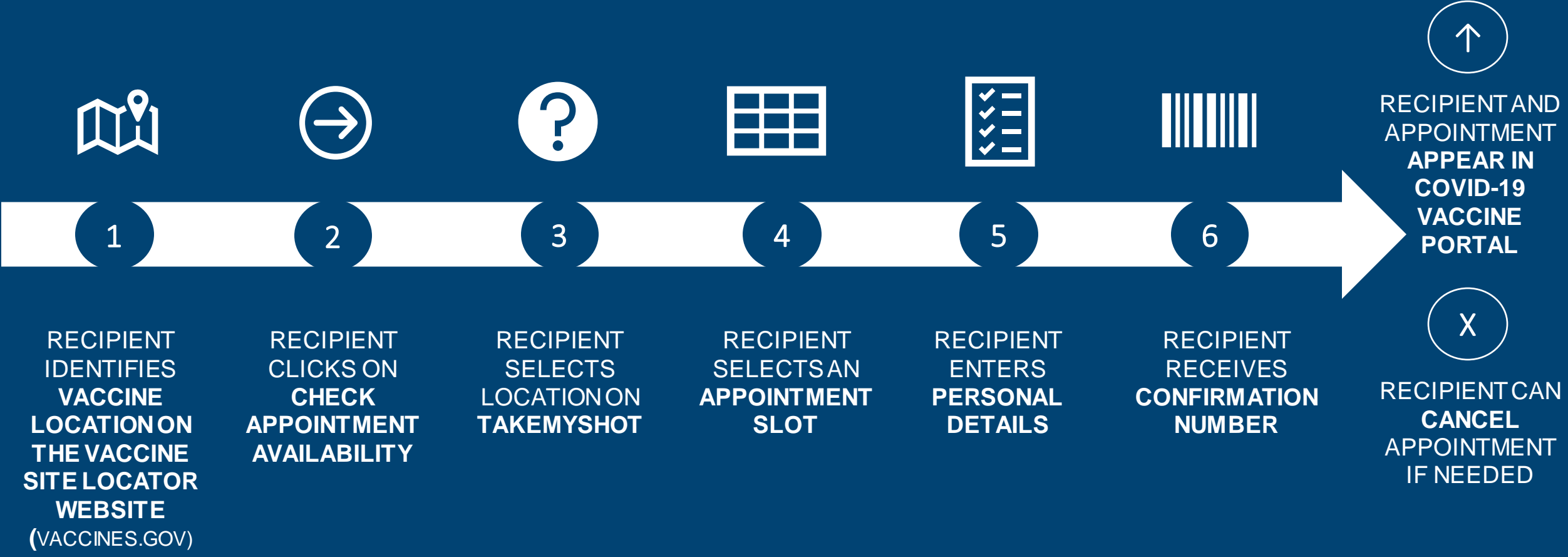
- The **AVAILABILITY REPORT** shows the number of appointment slots as defined by the location's availability and the number of appointment slots booked for first and second-dose appointments.
- The availability schedule is shared by first and second-dose appointments.
- Lastly, review the remaining quantity of appointment slots.

You may find that you need to increase availability to allow additional appointments to be booked. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on editing the default availability schedule. See the *Create Non-Regular Availability* section for more information on editing the availability schedule for temporarily editing the availability schedule..

Scheduling from the Perspective of a Recipient

Scheduling from the Perspective of a Recipient

Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.







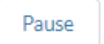
Appendix

CVMS Steps For Providers

- ✓ Step 1 - Register your organization
- ✓ Step 2 - Register each vaccine location and all prescribing providers who will administer vaccine
- ✓ Step 3 - Obtain NCID credentials
- ✓ Step 4 - Create user accounts for your organization's CVMS users
- ✓ Step 5 - Navigate the CVMS Provider Portal
- ✓ Step 6 - Receive and manage vaccine inventories
- ✓ Step 7 - Add locations to the find a vaccine location website
- ✓ Step 8 - Invite recipients to register in the COVID-19 Vaccine Portal
- ✓ Step 9 - Invite recipients to self-schedule their appointments (optional)
- ☐ Step 10 - Check-in recipients and document vaccination

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Author
1	03/12/2021	• Initial document	Kevin Kauffman, Kechia Scott, Kristin Clark
2	03/25/2021	• Added tip about Display Vaccine Site Locator field	Kristin Clark
3	04/01/2021	• Replaced screen shots to reflect Vaccine Brand field	Kristin Clark
4	04/06/2021	• Updated Recipient Scheduling process	Tabitha McKelvy
5	04/16/2021	<ul style="list-style-type: none"> • Added updated enable scheduling process • Updated Display on Vaccine Site Locator to dropdown • Added guidance for Location Setting field on location record • Updated guidance on non-regular closures 	Kevin Kauffman
6	05/14/2021	<ul style="list-style-type: none"> • Added non-regular schedule availability support • Included scheduling reports 	Kevin Kauffman
7	06/22/2021	<ul style="list-style-type: none"> • Updated Vaccine Site Locator to be the CDC website, Vaccines.gov • Updated steps for new location creation vaccine supply to edit 	Kevin Kauffman
8	06/28/2021	<ul style="list-style-type: none"> • 29-30: Updated location record screenshots with new field order • 51: Updated recipient appointment scheduling flow 	Kevin Kauffman
9	07/27/2021	• New user guide format	Vanessa Kemajou
10	08/26/2021	• Help Desk References Updated	Kaitlin Gates